

ServiceNow Knowledge Implementation

GLEN CHIASSON, JUNE 15TH, 2020



What Is Knowledge Management?

► Goals Of Knowledge Management

- Gather
- Analyze
- Store
- Share

Information



Why Use Knowledge Management?

- ▶ Self Service – The Key to Success
 - ▶ Reduce employee or customer help desk dependency
 - ▶ Less help desk calls reduces service costs
 - ▶ Employee productivity and customer satisfaction improvement by reducing resolution times
 - ▶ Promotes knowledge sharing



Areas Of Focus

- ▶ Knowledge management supports and enhances key business systems and processes
 - ▶ Incident management
 - ▶ Problem management
 - ▶ Change management

Continually Improve

- ▶ Identify knowledge gaps
- ▶ Add new and relevant content
- ▶ Track usage
- ▶ Governance and quality



Implementation Preparation

- ▶ Designate a knowledge process owner who is the voice for the organization. The authoritative decision maker
- ▶ Willingness to critically examine current working practices
- ▶ Identify your knowledge base consumers
- ▶ Identify article writers, editors and managers



Roles And Responsibilities - Manager

- ▶ Appoint a knowledge manager within your organization who is responsible for
 - ▶ Defining categories
 - ▶ Submitted article review for accuracy and standards
 - ▶ Identify new content to support the end users' needs
 - ▶ Encourage contribution
 - ▶ Create and maintain templates for consistency
 - ▶ Provide process metrics and reporting

Roles And Responsibilities - Contributor and User

- ▶ Contributors and Users
 - ▶ Submit new articles
 - ▶ Update content
 - ▶ Use articles in daily activities
 - ▶ Identify articles that are out of date or require updates

Knowledge User Roles

- ▶ knowledge_manager
 - ▶ Can administer knowledge bases and request new knowledge bases for the knowledge_admin to approve
- ▶ knowledge_admin
 - ▶ Can manage the Knowledge Base
- ▶ Knowledge
 - ▶ Can write, edit, and review knowledge management articles

Recommended Knowledge Plugin

- ▶ Knowledge Management Advanced
 - ▶ Not activated by default
 - ▶ Introduces article versioning and templates for article consistency

<https://docs.servicenow.com/bundle/newyork-servicenow-platform/page/product/knowledge-management/task/activate-knowledge-advanced-plugin.html>



Knowledge Base Implementation Steps



► Knowledge Base

- A repository where relevant and related articles are stored (IT for example)
- A Knowledge Base will contain structured categories and sub-categories within (Incident, Change, Self Service for example)
- Allow multiple KB's within the structure
- Each KB should have its own separate workflow
- KB should have unique categories with appropriate levels (use PDI or sketch for planning)
- Consider various article views (end user, customer, help desk)
- Create content / Import
- Encourage feedback and article rating



Guided Setup

4%
Complete




Welcome to Knowledge Management Guided Setup

Getting started


Continue

Knowledge Management enables customers, employees, and agents to find information such as self-help, troubleshooting, and task resolution. Knowledge content is stored in knowledge bases. Knowledge bases contain knowledge articles, which users create to share ideas, experience, and information. Users can search for, review, and provide feedback on knowledge articles, resolving issues themselves rather than contacting customer service or an internal helpdesk.


Knowledge Management helps capture and share the ideas, experience, and information that your users collectively possess. Effective use of Knowledge Management improves efficiency, quality of service, and customer satisfaction.

**Get going**
Get up and running with Knowledge Management quickly and easily

>

**Learn**
Learn common configurations in Knowledge Management

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**Be empowered**
Feel empowered to make additional configuration changes at a later time

Pre-Setup Guide

Determine your knowledge requirements in advance to ease the setup process.

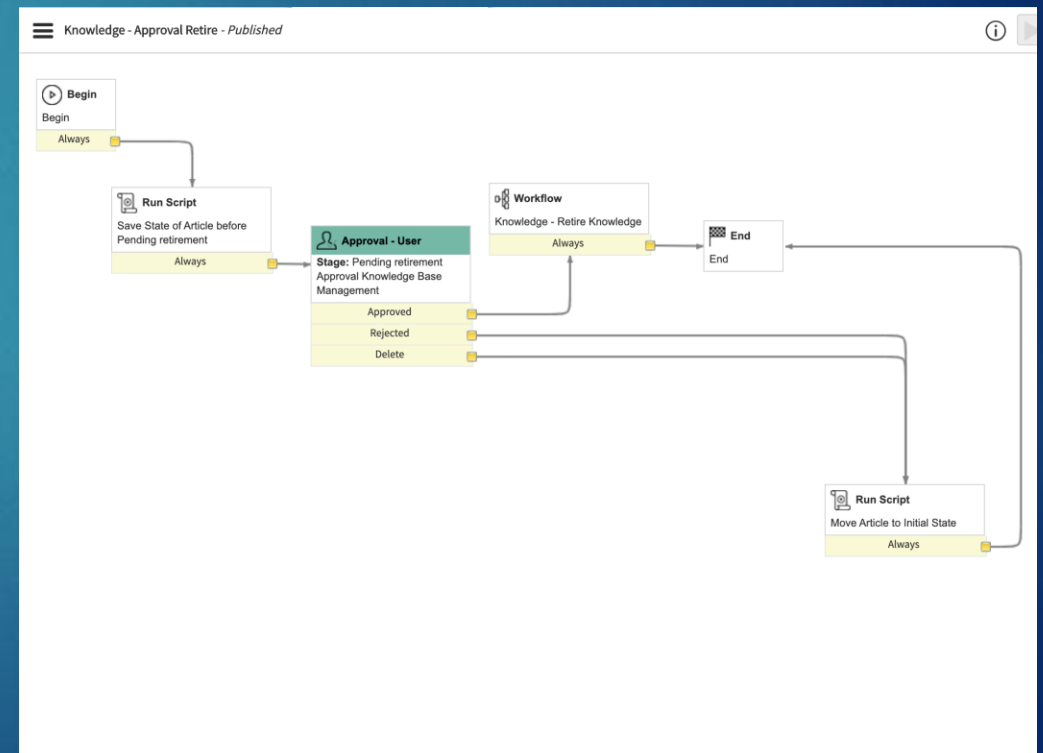
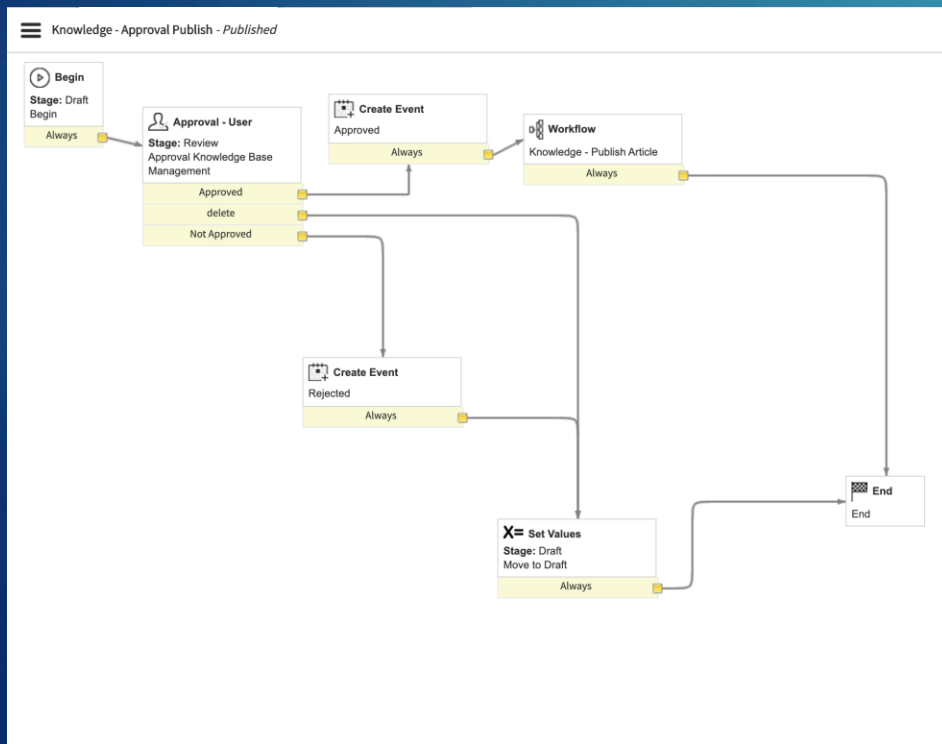
Knowledge base	Knowledge articles
Who are the consumers of knowledge base content?	Which article templates do you want to setup?
Which type of consumer should have access to which Knowledge Base?	Who should be responsible for authoring knowledge articles?
Which roles are required?	Which article categories are required?
Who are the admins, owners, and managers for the knowledge bases?	Do you want to create articles from a case or an incident?
What are the required workflows to publish and retire articles?	Do knowledge articles need to be translated into other languages?
What should or should not appear in the search results?	What should the default notifications that users receive be?
Are there any external sources that need to be integrated?	

- ▶ Knowledge has a guided setup which is a great starting point
- ▶ Walk through the setup process in your PDI



Workflows

- ▶ OOB Approval publish and retire workflows can be copied and modified for multiple knowledge bases
- ▶ Recommend implementing a solution bringing attention to upcoming articles that will retire



Knowledge Article Lifecycle States

- ▶ DRAFT – Article is saved but does not appear in the KB for users until it's reviewed and published
- ▶ REVIEW – Article is available to the KB manager and owner
- ▶ PUBLISHED – Article is available to users who have permissions to view
- ▶ RETIRED – Article is removed from the KB and is no longer available for users to view

Knowledge Base User Criteria




- ▶ Utilize user criteria for knowledge base access as opposed to ACLs. Managers can add and remove criteria but not create
- ▶ Criteria can be used at the knowledge base level as well as article level
- ▶ At this time, criteria cannot be utilized at the knowledge base category level. If this is required, I'd recommend placing those articles in a separate knowledge base

The screenshot shows a web interface for configuring user criteria. The title bar reads 'User Criteria' and 'Problem Analyzers' and 'Problem Solving' Group Members. A toolbar at the top right includes icons for edit, filter, and a menu, along with 'Update' and 'Delete' buttons. A light blue banner states: 'User Criteria may be used to restrict access to records in Service Catalog and Knowledge'. The main form has a 'Name' field with a dropdown arrow, currently showing 'Problem Analyzers' and 'Problem Solving' Gr...'. To the right is an 'Application' dropdown set to 'Global' with an information icon. Below these are several rows of checkboxes for different entities: 'Users' (locked icon), 'Groups' (locked icon, with text 'Problem Analyzers, Problem Solving'), 'Roles' (locked icon), 'Companies' (locked icon), 'Locations' (locked icon), and 'Departments' (locked icon). There is also an 'Advanced' checkbox and a 'Match All' checkbox. At the bottom left are 'Update' and 'Delete' buttons. A power icon is visible in the bottom right corner.

Knowledge Blocks

<

Knowledge
New record



Submit

Add Blocks

Search for Duplicates

* Knowledge base

IT

Q

i

Article type

HTML

Category

Q

Workflow

Draft

Valid to

2100-01-01

Source Task

Attachment link

☐

Display attachments

☐

* Short description

This is a KB With Blocks

Article body

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Accessible to all.

KBB0010006

Test KB

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Submit

Add Blocks

Search for Duplicates

Add Blocks

×

Q ACME

Advanced Search

KBB0010006

Test KB

Can Read:

All ACME North America employees

Cannot Read:

View

Insert

Create New Block

- ▶ Allows content within an article to be restricted by user criteria
- ▶ Driven by HR requirements can be helpful for organizations with internal and external customers where KA content differs
- ▶ Reduces KA management by eliminating the need for multiple articles of the same policies

Create Articles From Incidents and Problem Records

- ▶ Knowledge field located on task forms such as incident, change, problem and case is an OOB field that can be used to automatically create articles
- ▶ Existing Business Rule named Incident Create Knowledge can be modified and reused on any table such as change

The screenshot displays the 'Incident' form (INC0009009) in ServiceNow. The form is divided into several sections. At the top, there are fields for 'Subcategory' (set to '-- None --'), 'Service', and 'Configuration item'. To the right, there are fields for 'Urgency' (set to '2 - Medium'), 'Priority' (set to '4 - Low'), 'Assignment group', and 'Assigned to'. Below these, there is a 'Short description' field with the text 'Unable to access the shared folder.' and a 'Description' field with the text 'Unable to access the shared folder. Please provide access.'.

The 'Resolution Information' tab is active, showing a 'Knowledge' field with a green checkmark, indicating it is selected. Below this, there are fields for 'Resolution code' (set to '-- None --') and 'Resolution notes'. To the right, there are fields for 'Resolved by' and 'Resolved'. At the bottom, there are buttons for 'Update', 'Resolve', and 'Delete'. Below the buttons, there is a 'Related Links' section with a link to 'Repair SLAs'.

Knowledge Article Meta

<

What Is KB0010009 v5.0

CheckoutRetireDelete

Number

KB0010009

Version

5.0

Knowledge base

IT

Workflow

Published

Category

Announcements

Source Task

Published

2020-06-16

Attachment link

Valid to

2100-01-01

Display attachments

Short description

ServiceNow Vancouver Developer Meetup

Introduction

ServiceNow Developer Meetups are for developers interested in building on the Now Platform®. The exact format of each event can vary -from hearing a presentation about the developer features in the latest release, grabbing drinks at a local bar or pub while talking shop, to working through a hands-on lab. The core principle is that each event is focused on ServiceNow developers and developer content.

Explanation

If you are a ServiceNow Developer, ServiceNow admin interested in development, developer on another platform or just want to learn about ServiceNow development, you should attend.Topics range from Studio, Source Control, Business Rules, Script Includes, Scripted REST APIs, Service Portal and more.

Meta

glen, developer, tree

Checkout

Retire

Delete

Related Links

[View Article](#)

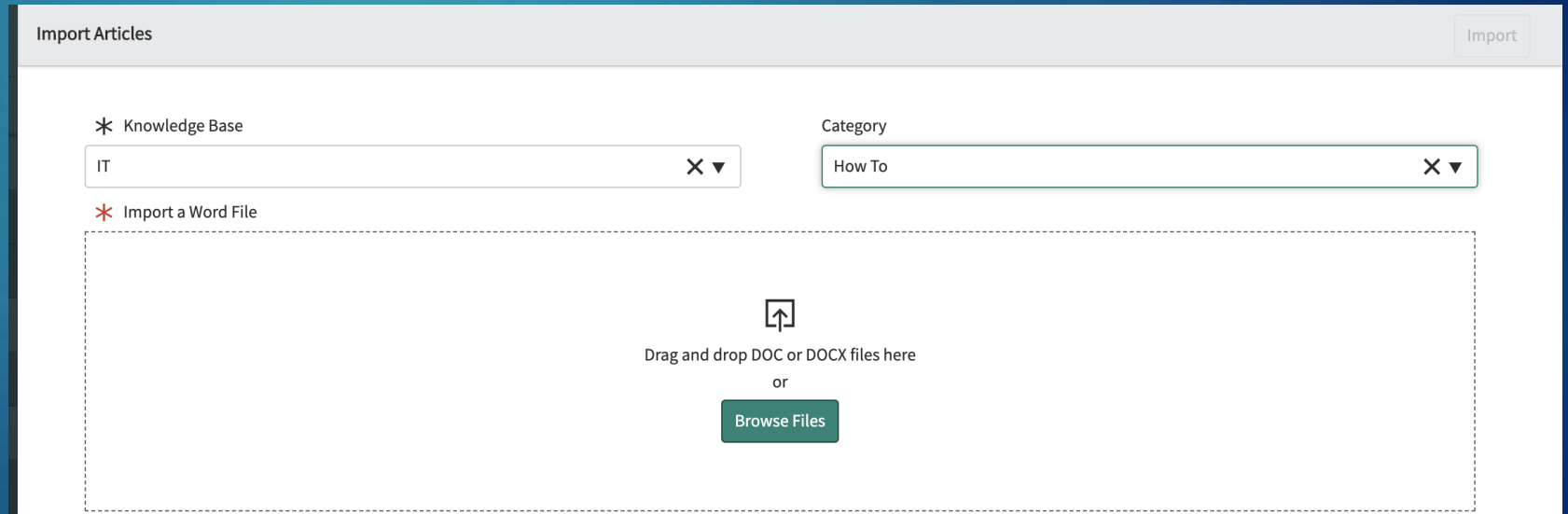
[Run User Criteria Diagnostics](#)

- ▶ Improve search results
- ▶ Focus on how a user would search
- ▶ Can mean the difference between a user creating a new article



Content Import

- ▶ External source can be defined by activating the Knowledge Management External Content Integration plugin
- ▶ Import MS Word documents
- ▶ Import format may differ from the original




The screenshot displays the 'Import Articles' interface. At the top right is an 'Import' button. Below the title bar, there are two dropdown menus: 'Knowledge Base' with 'IT' selected, and 'Category' with 'How To' selected. Below these is a section titled 'Import a Word File' with a dashed border. Inside this section, there is a central area with an upload icon, the text 'Drag and drop DOC or DOCX files here or', and a 'Browse Files' button.

Import Articles Import

* Knowledge Base IT ✕ ▼

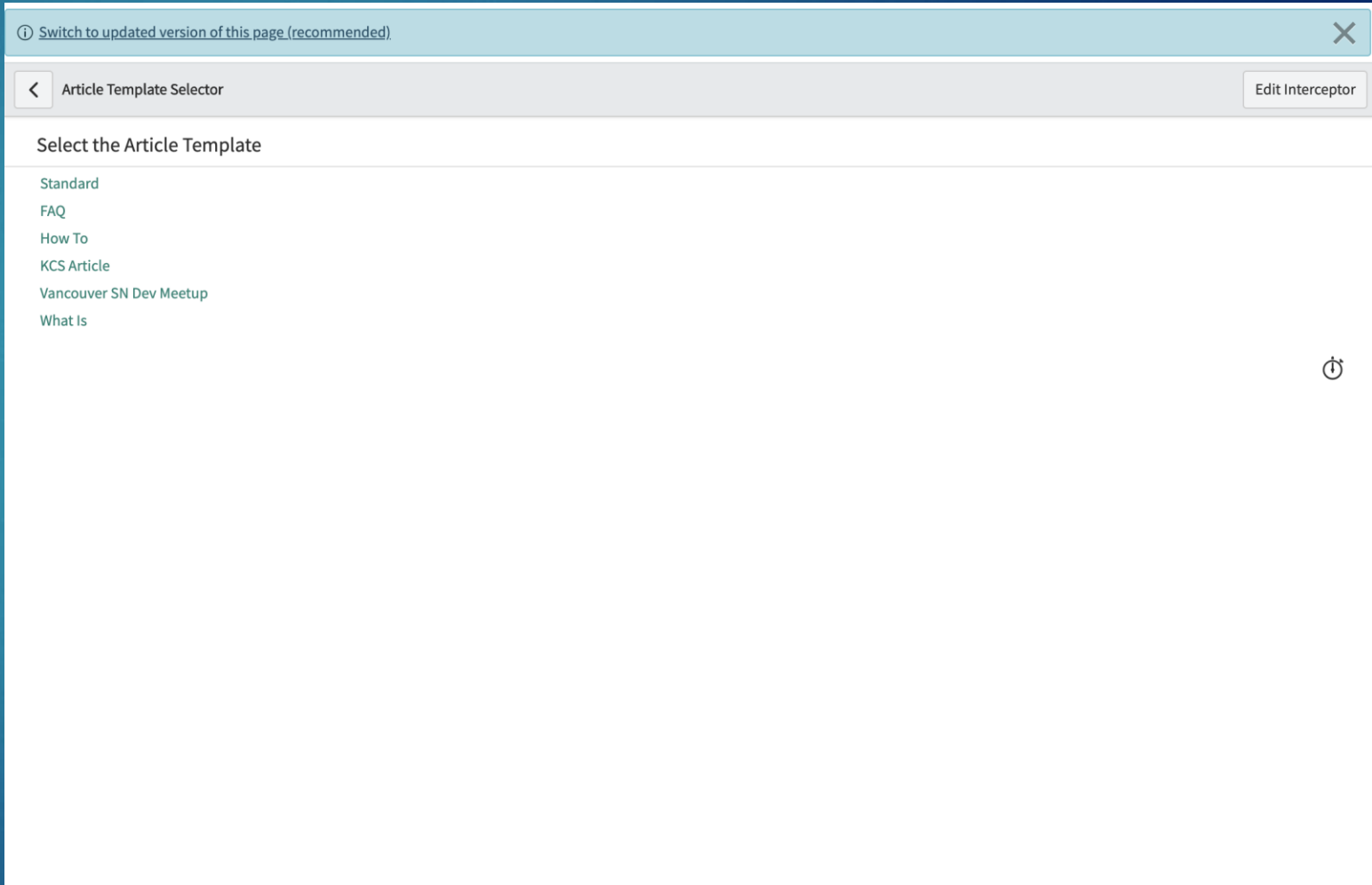
Category How To ✕ ▼

* Import a Word File

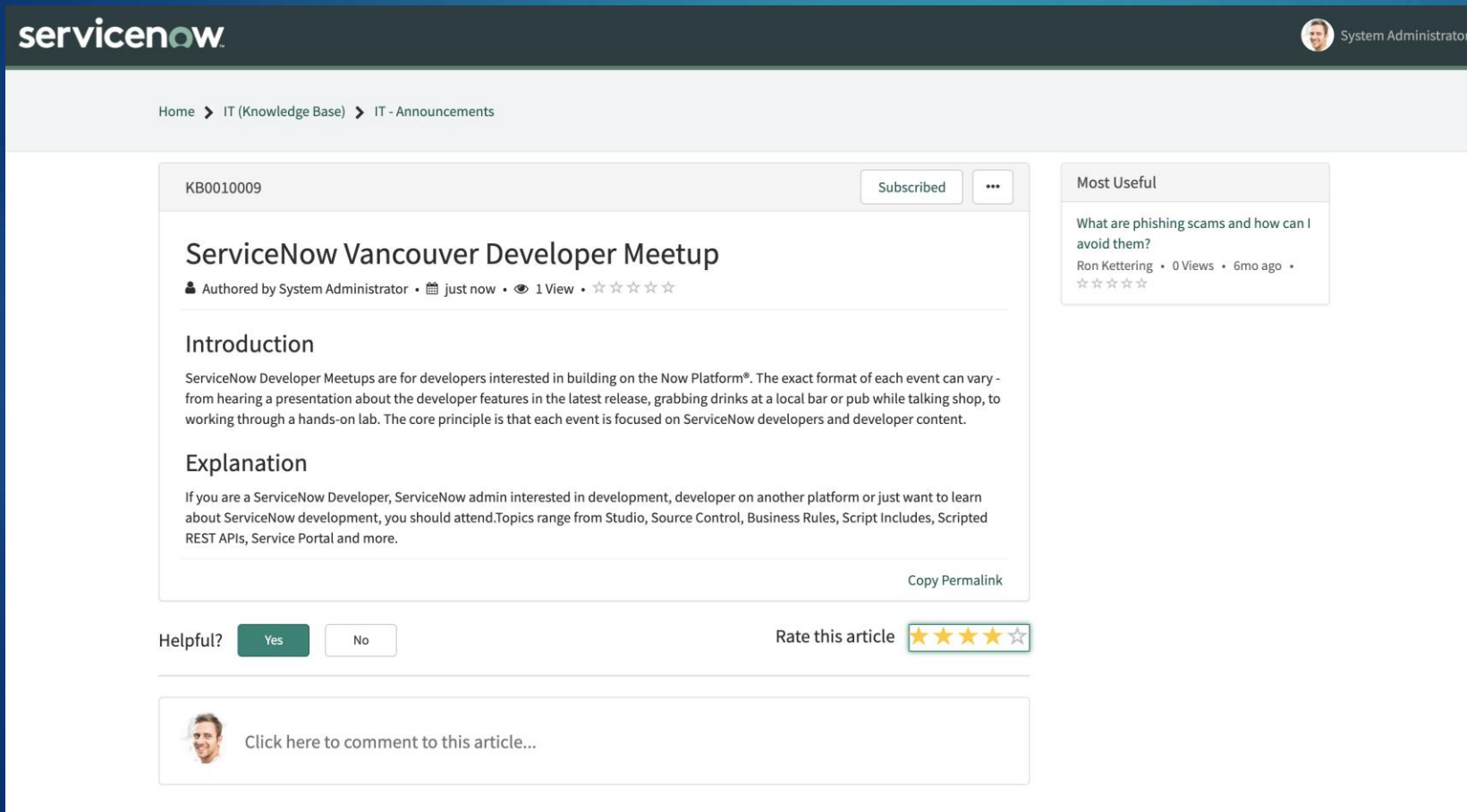

Drag and drop DOC or DOCX files here
or
Browse Files

Article Templates

- ▶ Users are presented with a template selection at the time of article creation
- ▶ Templates can be customized with field additions, mandatory fields etc.
- ▶ Ensures consistent look and feel to the user base



Article Feedback



The screenshot shows a ServiceNow knowledge article interface. At the top, the ServiceNow logo is on the left, and a user profile for 'System Administrator' is on the right. Below the header, a breadcrumb trail reads 'Home > IT (Knowledge Base) > IT - Announcements'. The main article area has a header 'KB0010009' with a 'Subscribed' button and a menu icon. The article title is 'ServiceNow Vancouver Developer Meetup', authored by 'System Administrator' 'just now' with '1 View' and a five-star rating. The article content includes an 'Introduction' and an 'Explanation' section. Below the article, there are 'Helpful?' buttons (Yes/No) and a 'Rate this article' section with a five-star rating. At the bottom, there is a comment section with a user profile icon and the text 'Click here to comment to this article...'. On the right side of the article, there is a 'Most Useful' sidebar with a list of related articles, including 'What are phishing scams and how can I avoid them?' by 'Ron Kettering'.

servicenow

System Administrator

Home > IT (Knowledge Base) > IT - Announcements

KB0010009

Subscribed

ServiceNow Vancouver Developer Meetup

Author: System Administrator • Just now • 1 View • ☆☆☆☆☆

Introduction

ServiceNow Developer Meetups are for developers interested in building on the Now Platform*. The exact format of each event can vary - from hearing a presentation about the developer features in the latest release, grabbing drinks at a local bar or pub while talking shop, to working through a hands-on lab. The core principle is that each event is focused on ServiceNow developers and developer content.

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Copy Permalink

Helpful?

Rate this article ☆☆☆☆☆

Click here to comment to this article...

Most Useful

What are phishing scams and how can I avoid them?

Ron Kettering • 0 Views • 6mo ago • ☆☆☆☆☆

- ▶ Users can rate articles which will provide useful feedback
- ▶ Feedback for an article can be viewed within a related list on the knowledge article itself
- ▶ Knowledge managers should review feedback regularly to ensure accuracy and relevant content

Thank You!

- Implementing Knowledge within ServiceNow can reduce both resolution times and calls to the help desk lowering operational costs

